



## Tips for Writing a Driver Handbook

by Matthew Kaufman

**H**iring, training, and retaining skilled vehicle operators is a common challenge for small transit system operators. Writing a driver's handbook will help you train your employees, and can result in greater retention of drivers who know what is expected of them and how to comply with those expectations.

A driver's handbook can help provide employees the training necessary to comply with federal and state regulations. It can also serve as a reference source when they have questions. Having a driver's handbook can also increase your agency's level of customer service, because your riders will receive a consistent level of service system-wide. You can help avoid those "But the other driver does it" situations.

### Start by Doing Research

The first step to writing your handbook is determining what information needs to be included. Make sure your handbook is useful and does not simply add reading for your drivers.

To prepare your handbook you should take the following steps:

- ✓ Determine what federal and state regulations with which you are required to comply and the steps your drivers must take to comply with those regulations. Examples include ADA requirements, FTA and FHWA drug compliance, and nondiscrimination acts.
- ✓ Talk to your drivers and dispatchers about common problems or questions that occur during the course of their workdays. These issues should



After gathering material for your handbook, make sure it will be **READ**—by presenting the information with an *easy-to-understand and engaging format.*

be addressed in your handbook.

- ✓ Speak with your mechanics. They may be able to provide valuable information regarding how drivers should be reporting maintenance problems or using vehicles to reduce maintenance problems.
- ✓ Provide riders with surveys to determine what they consider good and poor customer service. Address these issues in your driver handbook.
- ✓ Contact other transit providers in your area. They may be able to tell you about issues they have addressed that should be covered in your handbook. These providers may also have their own driver's handbooks that could be resources for you.

### Main Subjects to Include

You will have a good base of material for your handbook after doing the research above. The information should be organized into sections. These are some typical issues covered in transit driver handbooks:

- ✓ *Customer service issues*—such as the level of assistance drivers should provide to clients boarding or getting off the vehicle, fare procedures, pick-up and no-show policies, handling complaints, and policies about drinks and food on the vehicle.
- ✓ *Vehicle use information*—such as fueling procedures, parking, inspection, use of wheelchair lifts and motorized cart storage, what to do if a vehicle breaks down, and how and when to document vehicle maintenance.
- ✓ *Rules for drivers concerning interacting with the dispatcher so that drivers know when to call in updates regarding their location and passenger pickups.* Drivers also need to know what to do in the event of an accident, injury, or a passenger becoming suddenly ill. Also consider including information on the steps drivers should take in inclement weather.
- ✓ *Information on human resource policies.* This includes information on lunches and breaks, sick days, drug policies, dress, and personal belongings in the vehicle.

### Sources for Regulatory Information

You may not have immediate answers for all of the issues raised—particularly in reference to drug poli-

cies and ADA issues. Much of the information you need can be obtained for free from the Community Transportation Association of America (CTAA). It offers a guide for grantees of FTA Section 5307, 5309 and 5311 programs titled *How to Write an FTA Drug and Alcohol Policy*. Agencies covered by FHWA regulations should refer to the guide titled *Drug and Alcohol Testing for Human Services Transportation Providers*. For more information on CTAA, visit their web site at [www.ctaa.org](http://www.ctaa.org).

Information to assist you with ADA issues is available online, and books are available about the subject. If you are unable to find a book at your local bookstore, you may want to consider an online-book retailer that offers a larger selection of subject matter.

If you have questions regarding blood borne pathogens, CTAA offers *Minimizing the Risk from Blood Borne Pathogens: A Guide for Managers*. You may also want to refer to the state Commercial Driver Handbook for additional information.

### Make it User-Friendly

Once you have all of your materials, be sure to present them in an easy to understand and engaging format. Remember to use major subject headings and provide a table of contents. This will help make your handbook a resource your drivers will turn to for quick answers to questions.

You may also want to use graphics such as tables, charts, and pictures. Graphics will make the handbook more engaging. If you do not have a digital camera or scanner for adding photographs, you can always have your film developed onto a CD or digitized at a copy center.

That said, don't overuse graphics. Use them when they fulfill a specific purpose.

You can help your drivers retain the information in the handbook by adding a few questions at the end of each section of the handbook. This will encourage readers to pay more attention and go back to subjects they may have glossed over. You can also consider adding a question section at the end of the handbook covering all information provided.

Your ultimate goal is to provide your drivers with a source of information that will give them more confidence in their jobs and improve the quality of your transit services.

Kansas RTAP has sample policies and procedures on its web site at [www.ksrtap.kutv.ku.edu](http://www.ksrtap.kutv.ku.edu). Click on the "Technical Assistance" link.

Sources: *Complying with Federal Regulations: A Primer for Rural Transit Providers*, [www.ctaa.com](http://www.ctaa.com);

*Driver and Dispatch Personnel Policies*, Reno County Public Transportation Department;

*Driver Training for Small Urban and Rural Transit Systems in New York State*, New York State Department of Transportation. ▲

### Fuel price fluctuations,

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problem, "I think everybody's just trying to do as much as they can with the funds they have. It's spread us a little thinner... somewhere along the line we're going to have to do something like switching to hybrid vehicles." She also mentioned the possibility of depending more on renewable resources to provide energy for facilities—resources like wind and solar energy, both of which Kansas has in abundance.

Sarah Krom said, "Other than a standardized government rate for

fuel, I'm not sure there is an answer."

Gary Rohr was more hopeful. He brought up the possibility of banding together to contract with gas companies or stations as statewide fuel providers, saying, "[OCCK is] spending roughly, say \$10,000 a month on fuel; you take that across Kansas and that's millions of dollars a year." That is the kind of contract that might well be attractive to a fuel provider.

Lisa Warner and others highlighted the importance of cooperation and coordination between providers.

Dee Hull, however, pointed out the downside of relying solely on coordination to address the problems posed by high fuel prices: "Sometimes it sounds good to coordinate, but... when you get it down on paper, it's not cost-efficient."

Many transit managers have ideas about what needs to be done, and many of these ideas sound good. But a comprehensive statewide dialogue is needed to flesh out these ideas into solutions. Dee Hull said, "We've kind of batted around what we can do, but we haven't really zeroed in on the gas thing because everybody's still wondering where it will land." The continued fluctuation of fuel prices makes it all the more vital that transit agencies work together on strategies to address the issue. Solutions such as collective fuel bargaining will work in the good times as well as the bad. As yet, there is no forum planned for providers, government agencies, and legislators to deal with the fuel problem collectively. Many would welcome this. And I'm sure we all could come up with the gas money to get there.

Sources: "CTAA Calls for Immediate Response to National Energy Crisis," [www.ctaa.org](http://www.ctaa.org);

"Going Forward: Mass Transit Popularity Surges in U.S.," by Lindsey Layton for the *Washington Post*, April 30, 2000. ▲